Name: 2016 FINANCIAL DISCLOSURE STATEMENT **UNITED STATES HOUSE OF REPRESENTATIVES** REPORT TYPE FILER STATUS Joseph P. Kennedy III × × 2016 Annuel (Due: May 15, 2017) House of Representatives Member of the U.S. District: Æ 4 Daytime Telephone: 202-225-5931 Amendment For Use by Members, Officers, and Employees Form A Officer or **Employee** Employing Office: Termination Date of Termination: A \$200 penalty shall be assessed against any individual who files more than 30 days late. HAND DELIVERED, 1 of 36 Office Use Only) Staff Filer Type: (If Applicable)
Shared Principal Assistant

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

Yes No X Yes No X Yes No X		Yes × × × × × × × × × × × × × × × × × × ×	b. Receive more than \$200 in uneamed income from any reportable asset during the reporting period? B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period? C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period? D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? E. Did you hold any reportable positions during the reporting period? E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?
* · · · · · · · · · · · · · · · · · · ·	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar	X No	a. Own any reportable seset that was worth more than \$1,000 at the end of the reporting period? or

IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

Yes No X	EXEMPTION - Have you excluded from this report any other assets, "uneamed" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.
Yes No X	TRUSTS — Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?
Yes No X	IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.

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Name: Joseph P. Kennedy III	
Page 2 of 36	

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^{*}Filter is a discretionary beneficiary and has never received any income from this trust. Filter has disclosed 100% of the assets of the trust that have a value in excess of \$1,000

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SCHEDULE A - ASSETS & "UNEARNED INCOME" Joseph P. Kennedy III Page 17 of 36

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Name: Joseph P. Kennedy III	
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Name: Joseph P. Kennedy III

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"Represents a distribution to liter from residuary Trust UW George S. Brewster. During 2014 the trust was divided into two sub trusts, one for the benefit of the reporting individual and one for a family member. The except for the hust of the other family member are not reported. Filter has displaced 100% of the assets of the sub-trust for his benefit that have a value in excess of \$1,000.

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	SCHEDULE A - ASSETS & "UNEARNED INCOME"
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Name: Joseph P. Kennedy III

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Report any p	Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the recording period of any security or real property held by you, your source, or your	Į,	pe of Tr	Type of Transaction	3	1	Date				₹	ount c	Amount of Transaction	2	뚱	tion	tion
dependent di	dependent child for investment or the production of moorns. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction.					xosadec		>	80	c	0	<i>m</i>		T)	F 6		G
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disclose the	check the "capital gains' box, unless it was an easet in a tex-deferred account, and disclose the capital gain income on Schedule A.	rchaes	fo	rtal Sa	changi	neck Ba	applicable	,001- 5,000	5,001- 0,000	0,001- 00,000	00,001 50,000	50,001 00,000	00,001	,000,000,		,000,000 ,000,000 ,000,000 5,000,0	000,000, 000,000, 000,000, 0,000,0
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5	Adlent PLC (page 3, kem 2) received as result of				×		10/31/18	×									
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JT	Chubb Corp Corn (page 3, liem 7) exchanged for cash				×	×	1/15/16		×								
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5	Johnson & Johnson Com (page 4, leam 4)		×			×	6/3/16		×								
77	Johnson Controls Inc. Com (page 4, Item 5) exchanged for ceeh				×	×	9/9/16	×									
	and Johnson Controls Intil PLC (page 4, Hern 6) following merger				×		9/9/16	×									
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57	Quelcomm Inc. (page 4, Rem 15)		×			×	4/26/16	×		<u> </u>			1	<u> </u> _			
7	ABBVIE (page 5, item 7)		×			×	6/3/16	×							-		

Name:	
Joseph P. Kennedy III	
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Johnson Controls Intl PLC (page 7, Hern 10)	Adient PLC (page 12, Item 13) received as a result of Johnson Controls spin off (page 14, Item 1)	Key Corp. New Corn (page 9, Itum 3)	Bristol Myans Squibb (page 9, ilem 1)	Quetomm Inc. (page 8, item 6)	tem 4)	t, tem 3)	Nextern Energy (page 8, Nem 2)	Monsanto Co. (page 7, Nem 18)	Medironics PLC (page 7, llam 12)	7, Neer 11)	Johnson Controls Intl PLC (pgs 7, liem 10) following Merger	Johnson Controls Inc. Com (page 7, item 9) exchanged for	Facebook Inc. CL.A (page 7, item 4)	Crown Castle Inc. REIT (page 6, llem 16)	Chubb Ltd. Stock (page 6, item 14) following marger	Chulsb Corp Corn (page 8, lean 13) exchanged for cash and	Johnson Controls spin off (page 7, Item 9)	Adient PLC (page 6, hem 6) received as a result of	Mage Corp. Stock	Asset	Capture Camers in a Series transaction installed in a Capture gain in expose or activity creek this "capital gains" both, where in twee are seed in a liter-deferred account, and disclose the capital gain income on Schedule A. * Column K is for seases solely held by your spouse or dependent child.	resided in a capital loss. Provide a brief description of an exchange transaction. Excluse transactions between you, your sposses, or dependent children, or the purchase or sale of your personal residence, unless it generated needs income. If only a portion of an essent is sold, please choose "purisal sale" as the type of transaction.	Raport any purchase, sele, or exchange transactions that exceeded \$1,000 in the importing period of any security or ned property hald by you, your spouse, or your decease, or your decease, any use of the exceeded of the period
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Crown Castle trill (page 19, item 2)	and Chubb Limited Stock (page 18, item 18) following Marger	Chubb Corp Comm (page 18, item 15) exchanged for cash	Verton Consunications Inc. (page 17, Item 2)	US Sencorp New (page 14, Rem 15)	Qualcomm Inc. (page 14, ilem 11)	Oracle Systems Corp. (page 14, llem 9)	Moneamb Co (page 14, Bem 8)	Microchip Technology Inc. (page 17, liem 1)	Marrioti Intil Ino CL A (page 14, item 2)	Johnson Controls Intl PLC (page 15, lern 1)	and Johnson Controls Intli PLC (page 16, Item 1) following Manger	Johnson Controls Ino Com (page 14, Item 1) exchanged for cesh	Fecebook Inc A (page 13, Item 12)	Nem 0)	Chigroup (page 17, flam 6)	and Chubb Limited Stock (page 13, Item 4) following Marger	Chubb Corp. Com (page 13, llam 3) exchanged for ceeh	Grown Gastle kell Co REIT (page 13, hem 8)	Magin Corp., Stock	Asset	Exclusive transactions between you, your appare, or deparativet childret, or the purchase or sale of your personal resistance, unless it generated restel income. If only a purific of an asset is soit, please choose it puralls sale; as the type of temesotion. Capital Galles: if a sales transaction resisted in a capital gain is excess of \$300, check the "capital gain" box, unless it was an asset in a tax-deferred soccurs, and discloss the capital gain income on Schedule A. * Column K is for assets solely hald by your spouse or depandent child.	repaintly person or any amount or has property rise; by yet, year equates, or year dependent deld for investment or the production of frozens, include transactions that readed in a capital loss. Provide a brief description of an acchange transaction.	neadons that exceeded \$1,00
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Ecoleb Inc. (page 23, Item 8)	Crown Cashs Intl REIT (page 23, Nem 4)	Johnson Controls spinoff (page 24, item 1)	Adlent PLC (page 22, lasm 13) received as a result of	Newtons Energy Inc. (page 21, flam 11)	Bristol Moyers Squibb (page 21, item 6)	Cligroup (page 21, ilem 10)	Johnson Controls spinoff (page 19, item 10) Below report threshold	Adient PLC (page 20, hern 14) received as result of	Quelcomm (page 20, item 6)	Pfizer Inc. (page 20, item 4)	Oracle Systems Corp (page 20, item 3)	Monaemio (page 20, tem 2)	Meditronic PLC (page 19, Nem 15)	Attended and Inc CL A (page 19, item 13)	Johnson Controls Intl PLC (Barn 19, Burn 11)	and Johnson Controls Intl PLC (page 19, liem 11) following Merger	Johnson Controls Inc Corn (page 19, Item 10) suchanged for cash	Facebook Inc. CLA (page 19, item 6)	go Exemple Maga Corp. Stack	SP, DC, JT Asset	Capital Gains: If a sales transction resulted in a capital gain in excess of \$200, chack the "capital gains" box, unless it was an asset in a tax-deferred account, and declose the capital gain income on Schedule A. * Column K is for assets solely held by your apouse or dependent child.	dependent chief for investment or the production of income. Include transactions that measured in a capital loss. Provide a brief description of an exchange transaction. Exclude immediate between you, your spouse, or dependent officies, or the purchase or sale of your personal residence, unless it generated reside income. If only a portion of an asset is said, please choose 'partial sale' as the type of transaction.	Report any purchase, sele, or exchange transactions that exceeded \$1,000 in the
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Name: Joseph P. Kennedy III Page 30 of 36

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	Celgane (page 25, item 12)	Walmart (page 25, Bern 1)	filumberger i	uelcomm (pe	ade System	odera Energy	Monsanto (pege 24, fem	creahip Tech	d. He Inc. (pa	erioti inti inc	ser Technol	hnson Contro	d Johnson C	hnaon Contro	accel Corp (pa	osbook Inc. (d Chubb Lim	ubb Corp Co			esset is sold. If a sale train If a sa		COMPAN MA
	25, Item 12)	25, liem 1)	Schlumberger Ltd. (page 24, iben 15)	Qualcomm (page 24, liam 13)	Orade Systems (page 24, turn 12)	Nextern Energy (page 24, item 11)	e 24, Reen 10)	Microchip Technologies (page 24, Ibam 8)	Mellille Inc. (page 24, item 6)	Merriott Intil Inc. CL A (page 24, leem 4)	Linear Technology (page 24, item 3)	Johnson Controls Intl PLC (page 24, Item 2)	and Johnson Controls Intl PLC (page 24, Nam 2) following Manger	Johnson Controls Inc Com (page 24, Item 1) exchanged for cash	Hexxel Corp (page 23, lisen 14)	Facebook Inc. CL A (page 23, Ram 10)	and Chubb Limited Stock (page 23, flem 3) following Merger	Chubb Corp Corn (page 23, flors 2) exchanged for cash	Maga Corp. Stock	Asset	portioned or associated please choose? Unless is generated introduction. If only a portion of an easter it is add, please choose? Portist said: as the type of transaction. Capital Gains: if a sales transaction resulted in a capital gain in access of \$200, chack the frapital gains' box, unless it was an asset in a lax-delened account, and disclose the capital gain income on Schedule A. *Column K is for assets solely held by your spouse or dependent critic.	partiest child for Investment or the production of income, Include transactions that submit it is appeared to the production of the community transactions that eached in a capital loca. Provide a brief description of an exchange interescition, children, for the children transactions between you, your apouse, or dependent children, or the	Report any purchase, mile, or exchange learnendage that expended \$1,000 in the
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Name:

Joseph P. Kennedy III

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of 36

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												Standy White Private Equity Partners (2018) LP (page 16, item 15)	Received as result of Brandy Wine Private Equity Partners (2013) LP (page 16, item 9) SPINOFF	Brandy Wine Private Equity Partners (2013A) LLC (page 16, ilem 11)	Compute Maga Cosp. Stock	Asset	a portion of enterest is sold, please choose "partial sale" as the type of transaction. Capital Gains: If a seles transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a translationed account, and disclose the capital gain income on Schedule A. *Coheren K is for assets solely hald by your spouse or dependent child.	5000	purchasa, sala, or suchange in
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]			Over \$30,000,000	-	

SCHEDULE C - EARNED INCOME

Name: Joseph P. Kennedy III Page 32 of 36

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S., government) totaling \$200 or more during the reporting period. For a spouse, list the source and amount of any honoranis, list only the source for other spouse earned income exceeding \$1,000. See examples below. EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act. INCOME LIMITS and PROHIBITED INCOME: The 2016 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,495. The 2017 limit is \$27,765. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.	nment) totaling \$200 or more during the release. Social Security Act. If at or above the "senior staff" rate was \$ y relationship) are totally prohibited.	reporting period. For a spouse, list \$27,765.
Source (include date of receipt for honoraria)	Туре	Amount
	Approved Teaching Fee	\$6,000
EXBMID198: CM Wer Roundhalo (Oct. 2) Ontario County Board of Education	Spouse Speech Spouse Solary	\$1,000
National Partnership For Women and Families. Washington, DC	Spouse Salary	A/N
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	Joseph P. Kennedy III	
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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your epouse, or your dependent child. Mark the highest amount owed during the reporting period. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities of a business in which you own an interest (unless you are personally liable); and liabilities of a pouse or the child, perent, or sitting of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. "Column K is for liabilities held solely by your spouse or dependent child.

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Hervard Cri	Aspha Res	Welle Fargo Benk, N.A.	Wells Fargo	Wells Fargo	Emmple			
Hervard University, Cembridge, MA	Asphe Resources, Des Moines, IA	Bent, N.A.	Wells Fargo Bank, N.A. (paid in full-during year)	Welle Fargo Bank, N.A. (peld in full-during year)	First Bank of Wilmington, DE	Creditor		
09/2005	09/2006	09/2016	07/2013	04/2013	6/90	Date Liability Incurred MO/YR		
Student Loan	Student Loan	Mortgage of Personal Residence, MA	Mortgage of Personal Residence, MA	Mortgage on Personal Residence, DC	Mortgage on Restal Property, Dover, DE	Type of Liability		
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						\$25,000,001- \$50,000,000		
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					L	Over \$1,000,000* (Spouse/DC Liability)	*	

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business emberprise, norprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. Member Board of Directors Director Position Robert F. Kennedy Human Rights (formerly Robert F. Kennedy Memorial) Robert F. Kennedy Children's Action Corps. Name of Organization

Brigham and Women's Hospital - Ann Romney Center for Neurologic Diseases

Harvard University institute of Politics

Sooner Foundation

Note - SP Salile Mae, Wilkes Berre, PA. Student loan reported in 2015 is no longer included. Below report threshold end of 2015.

Use additional sheets if more space is required.

Member Board of Directors

Member Advisory Board

Member Senior Advisory Committee

SCHEDULE F - AGREEMENTS

Name: Joseph P. Kennedy III Page 34 of 36

Identify the data, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
	NONE	

SCHEDULE G - GIFTS

Report the source (by name), a brief description, and the value of all gifts totaling more than \$375 received by you, your spouse, or your dependent child from any source during the year. Exclude: Gifts from relatives, gifts of personal hospitality from an individual, local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$150 or less need not be added towards the \$375 disclosure threshold. Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule.

Source	Description	Value
Example: Mr. Joseph Smith, Arlington, VA	Silver Platter (determination of personal intendably received from the Ethics Committee)	\$400
NONE		

SCHEDULE H - TRAVEL PAYMENTS and REIMBURSEMEN

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Name:
loseph P. Kennedy III
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36

identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$375 received by you, your spouse, or your dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

the tiler.						
	Source	Deta(s)	City of Departure-Destination-City of Return	Lodging? (Y/M)	Food? (Y/M)	Family Monther Included? (Y/N)
	Government of China (MECEA)	11-9-fley	OC-Buijing, China-OC	۲	Y	Z
	Habital for Harmonity (charity fundraless)	Mar. 3-4	DC-Boston-OC	٧	٧	٧
NONE						

SCHEDULE I – PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

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Activity Date Amount
